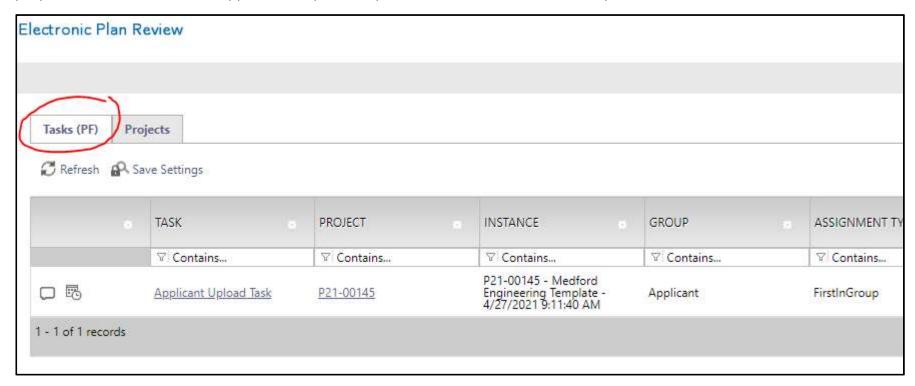
### ELECTRONIC PUBLIC IMPROVEMENT PLAN REVIEW APPLICANT'S GUIDE

## APPENDIX B: PROJECTDOX INSTRUCTIONS

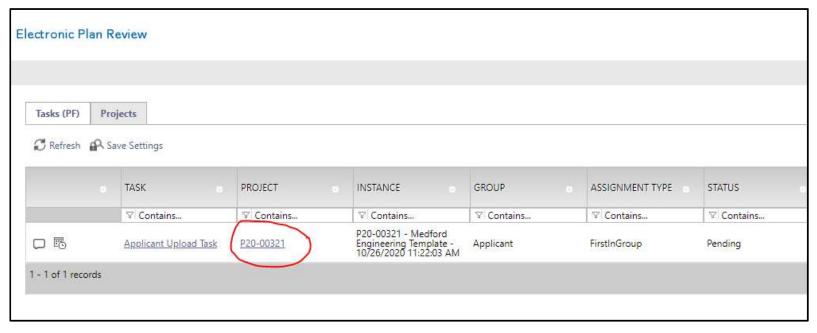
# HOW TO UPLOAD NEW PLANS AND DOCUMENTS AND COMPLETE THE "APPLICANT UPLOAD TASK"

https://planreview.cityofmedford.org/ProjectDox/

<u>IS IT TIME FOR "APPLICANT UPLOAD"?</u> – When an "Applicant Upload Task" has been assigned, the task will be listed on the "Tasks" tab. The purpose of this task is for the Applicant to upload all plans and documents that are required for review.



**NAVIGATE TO THE PROJECT** – To open the project screen, click on the **project number** in the "PROJECT" column on the "Tasks (PF)" tab or the "Projects" tab.





<u>PREPARE TO UPLOAD FILES</u> – When uploading plans and documents to ProjectDox, the <u>file names are extremely important</u>. To avoid issues, <u>do not</u> include dates or the words "draft" in the file name (unless it is the Draft Final Plat) because revisions to plans and documents will need to be uploaded with the EXACT same name as the initial file uploaded (see <u>Appendix G</u> for How to Upload Revised Plans and Documents).

File names should be simple and clearly describe what the document is. Upload files to ProjectDox as outlined:

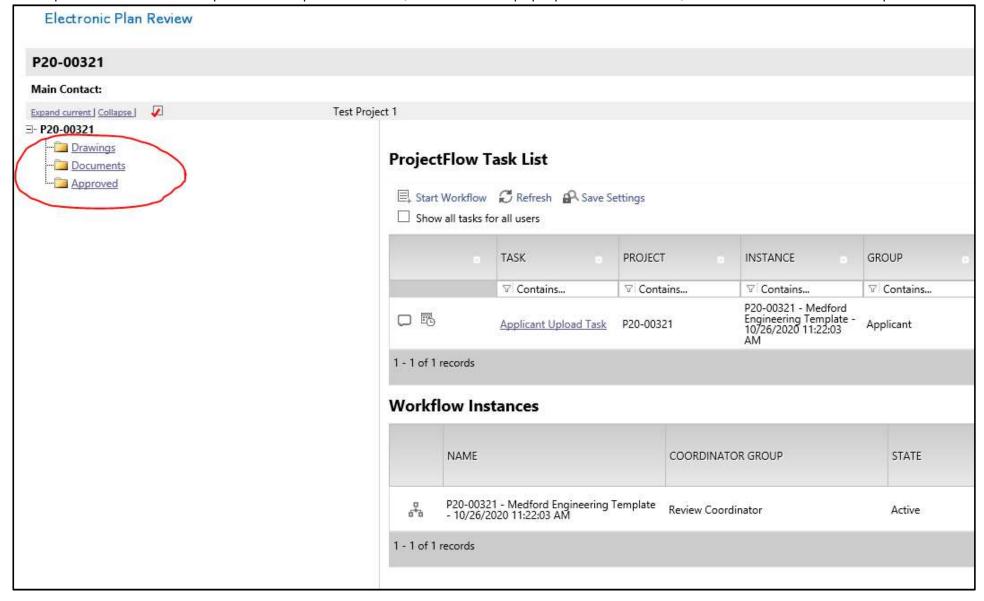
### **Drawings Folder**

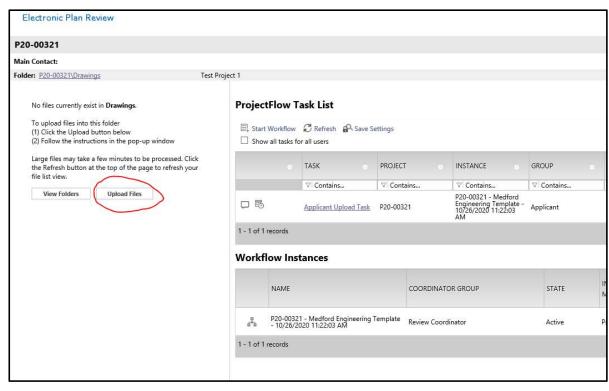
- Public Improvement Plan Set
  - o Upload all sheets in one combined pdf file.
  - Use the Project Name as the title and do not include dates. For example: "Clearview Subdivision Phase 4" or "Smith Road Street Improvements".
  - o For first submittal, plans do not need to be stamped and signed.

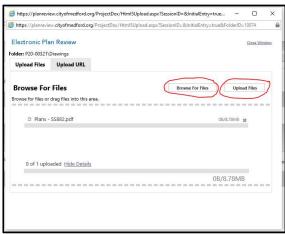
#### **Documents Folder**

- All files except for the public improvement plan set should be uploaded to the Documents Folder
- Each file should be uploaded separately
- Use the document name and avoid dates. For example: "Voltage Drop Calculations", "Draft Final Plat", "Supplemental Fire Plan", and "Geotech Report".

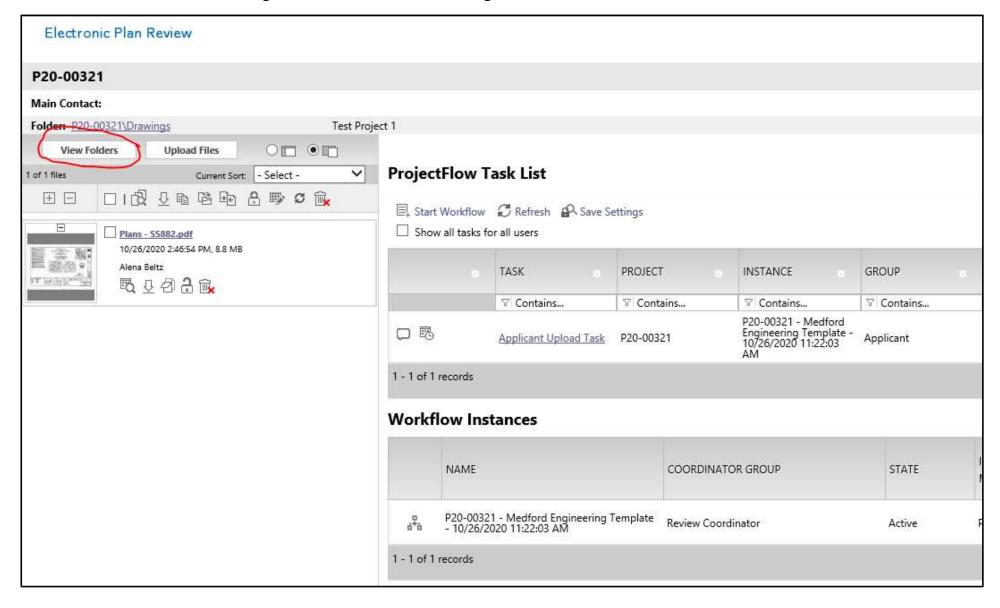
<u>UPLOAD FILES</u> – Once on the project page, click on one of the folders ("Drawings" or "Documents") to upload files. Once in the folder, click the "Upload Files" button to open the file upload window (make sure that pop-ups are not blocked). Browse for files and then Upload.



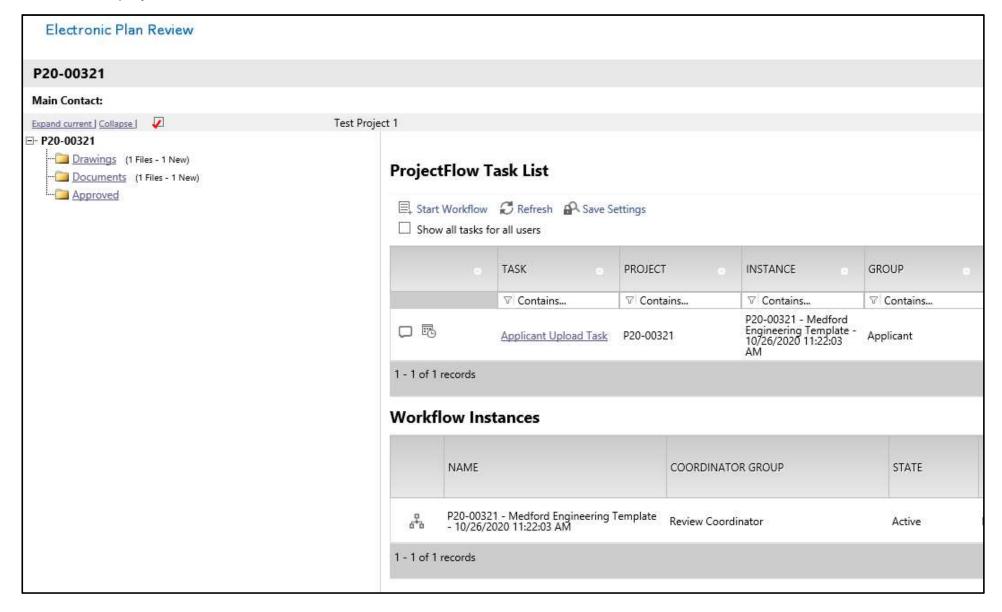




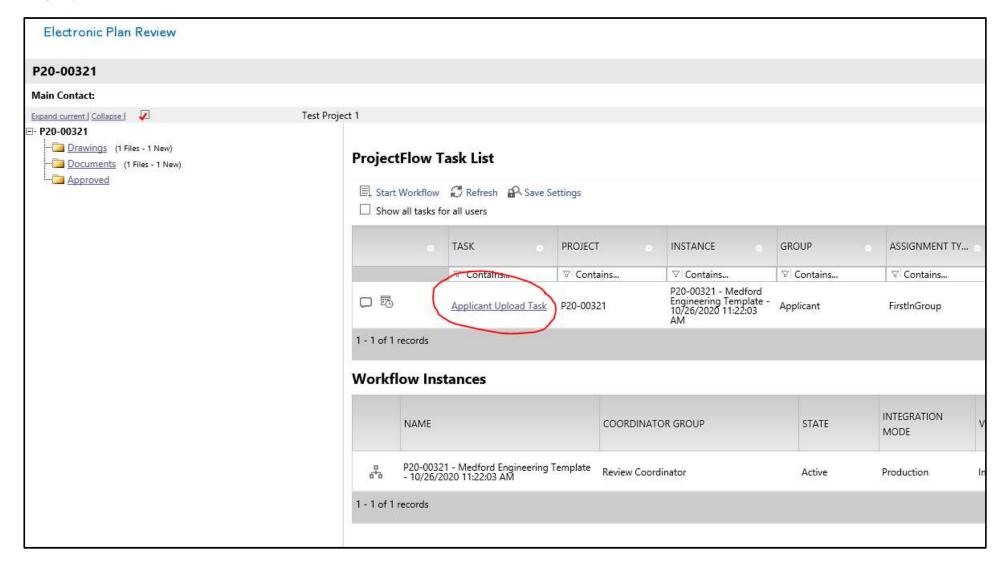
NAVIGATE BETWEEN FOLDERS – To get to a different folder ("Drawings" or "Documents"), click on the "View Folders" button.



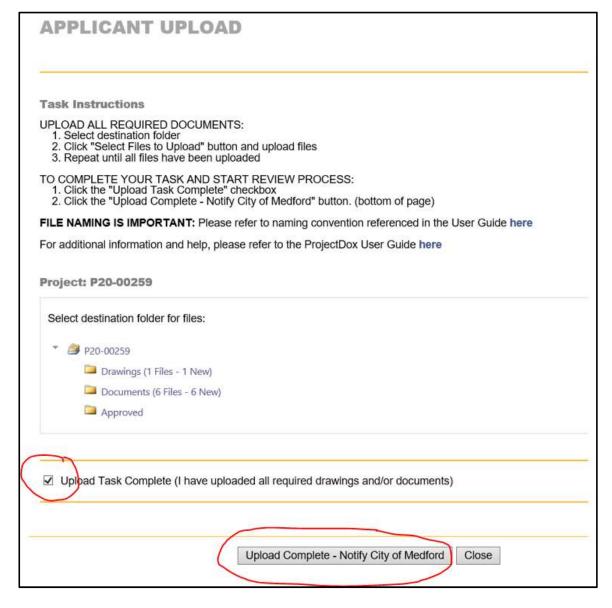
<u>REVIEW UPLOAD</u> – Check to make sure each folder contains all the required documents. The number of files contained in each folder is shown on the project screen.



<u>OPEN "APPLICANT UPLOAD TASK" E-FORM</u> – Make sure that pop-ups are enabled and then click on the "Applicant Upload Task" to open the E-Form.



<u>COMPLETE "APPLICANT UPLOAD TASK"</u> – Once the e-form is open, complete the "Applicant Upload Task" by clicking the "Upload Task Complete" checkbox and then clicking the "Upload Complete – Notify City of Medford" button. Once this is done, the project will no longer be listed on the Home Screen Tasks Tab.



<u>VERIFY THAT THE "APPLICANT UPLOAD TASK" IS COMPLETE</u> – The City of Medford will <u>not</u> be notified that the project plans and documents are ready for review until the "Applicant Upload Task" has been completed. To verify that this task is complete, check to make sure the task is no longer shown on the project screen and/or the project is no longer listed on the Home Screen Tasks Tab.

